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Whose Transition?

Unpacking the Discourse on Transitioning Away from Fossil Fuels in Climate Negotiations

Mohana Bharathi Manimaran and Sumit Prasad



Image: UN Climate Change - Kiara Worth

A huddle on the dais during the COP 30 closing plenary.

Executive summary

At the 28th Conference of the Parties (COP28) in 2023, Parties agreed, for the first time, to transition away from fossil fuels, with paragraph 28(d) of the first Global Stocktake (GST 1). Marking an inflection point in the transition discourse, the decision was adopted with a view to accelerate action in this critical decade and achieve net zero by 2050. The urgency and need for ambitious action have only sharpened since. The United Nations Environment Programme (UNEP) estimates end-of-century warming at 2.3–2.5°C, even if current nationally determined contributions (NDCs) are fully implemented (UNEP 2025). More recently, UNEP also projected that an overshoot of 1.5°C is likely within the next few years, with the best-case peak temperature rise estimated at 1.8°C (UNEP 2026).

While the need for a transition is urgent, the GST 1 decision (Decision 1/CMA.5) also made clear how this transition should be pursued. The transition was to be "just, orderly and equitable", and the decision called on Parties to contribute "in a nationally determined manner", taking into account their different national

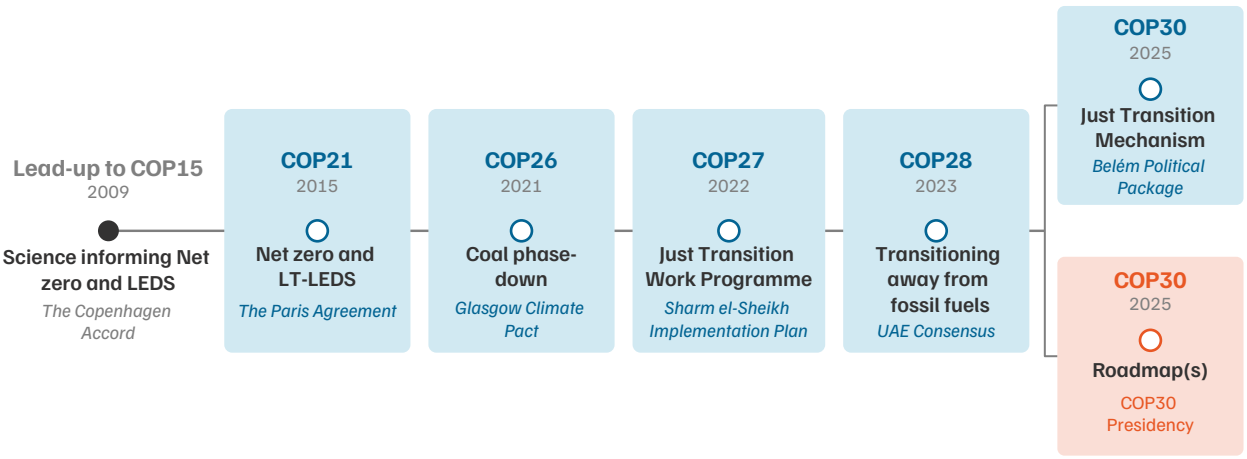
circumstances, pathways, and approaches (UNFCCC 2023b, 5–6). Irrespective of the pace of the multilateral process, substantial transition efforts are already underway, including in developing countries (MNRE 2026; Jones and Nana 2026; Yang et al. 2026).

Three years after the GST decision, the COP30 Presidency is now developing a roadmap for transitioning away from fossil fuels (TAFF) outside the negotiations. This reflects a broader shift towards coalitions and implementation beyond formal negotiations. However, for transitions, the process has implications for whether the transition is ultimately just, orderly, and equitable. In this context, this brief draws on a review of United Nations Framework Convention on Climate Change (UNFCCC) decisions, the associated literature, and an analysis of the 21 Party submissions made to the Presidency as of July 2026 to examine the evolution of the transition discourse within the UNFCCC, the scope of what the transition means for the Global South, and key observations from the Parties' submissions. In doing so, it presents considerations for reconciling ambition and equity in the transition discourse to preserve the scope for consensus-based negotiations while enabling delivery under inclusive initiatives.

Transitions in the UNFCCC negotiations: Paragraph 28(d) was a turning point, not a starting point

The question of transitioning predates COP28 (see Figure ES1). The Paris Agreement established two foundational channels for long-term ambition: net zero under Article 4.1 and long-term low-emission development strategies (LT-LEDS) under Article 4.19. The Glasgow Climate Pact at COP26 subsequently referenced phasing down unabated coal power. The Sharm el-Sheikh Implementation Plan at COP27 established the Just Transition Work Programme (JTWP), extending the agenda to include energy, livelihoods, and social protection. The UAE Consensus at COP28 then brought the transition discourse into the GST decision. For the first time it brought explicit attention to the emissions source, signalling the beginning of the end of the fossil-fuel era (UNFCCC 2023a). At COP30, Parties agreed to develop a Just Transition Mechanism (JTM) to take forward the work under JTWP, and is to be operationalised at COP31. Together, these decisions, work programmes, and institutions establish both the need to transition and the means of pursuing it. They are grounded in the principle that countries act according to their common but differentiated responsibilities and respective capabilities (CBDR-RC) and in light of their national circumstances.

Figure ES1. Evolution of the transition discourse within UNFCCC negotiations



Source: Authors' visualisation

Acronyms: COP: Conference of the Parties; LEDS: low-emission development strategies; LT-LEDS: long-term low-emission development strategies

The call for a roadmap was a parallel development initiated by observer organisations at the Bonn intersessional meeting in June 2025 (ENB 2025). **When a negotiated roadmap did not secure consensus at COP30, the Presidency committed to developing one outside the formal negotiations**. Two processes have since emerged. The first was the First Conference on Transitioning Away from Fossil Fuels, convened in Santa Marta in April 2026 by Colombia and the Netherlands with the support of the COP30 Presidency. It brought together 57 developed and developing countries but did not invite several major Global South economies, including China and India (IISD 2026; Dunne 2026). The second is the Presidency's own roadmap process, informed by Party and non-Party submissions and structured dialogues.

These voluntary initiatives reflect a broader shift towards implementation and cooperation beyond formal negotiation spaces. However, **concerns remain about the potential influence of these processes on formal negotiation outcomes, particularly for developing countries that are not participating**. At the 64th sessions of the Subsidiary Bodies (SB64), some developing country Parties stated that such initiatives must remain voluntary and must not steer the Convention's mandates. Collectively, this has created a moment in the transition discourse in which **there is consensus on the need for a transition but not on the process intended to guide it.**



Image: Joel González / Presidencia de Colombia, PDM

Leaders gathered at COP30 in Belém, Brazil. At the summit's opening, Brazil proposed the development of a 'roadmap' to transition away from fossil fuels.

Transitions on the ground: Economy-wide transformations

For emerging markets and developing economies (EMDEs), **moving away from fossil fuels involves not one transition but several simultaneous transformations**: labour markets, public finances, industry, energy markets, and infrastructure must all change together. While this may be true for every economy, it is more challenging for economies that must undergo these transformations while basic development gaps persist. As of mid-2026, 655 million people still lack access to electricity, 85 per cent of whom are in sub-Saharan Africa (ESMAP 2026).

The labour market implications of these transitions are substantial. India's coal sector supports around 500,000 mine workers (PIB 2025), and South African coal mining employed nearly 91,000 workers as of 2022 (Minerals Council South Africa n.d.). A green economy could create far more jobs than it displaces (ILO 2022). However, the costs and benefits of the transition are unevenly distributed. India's NITI Aayog (2026), for instance, reports that fossil-fuel-dependent states such as Jharkhand, Chhattisgarh, and Odisha face greater transition risks, while 75 per cent of installed solar and wind capacity is concentrated in Rajasthan, Gujarat, Maharashtra, Tamil Nadu, and Karnataka. Whether the potential benefits of growth and employment reach the workers and regions experiencing job losses therefore depends on targeted interventions in reskilling, social protection, and, above all, finance.

However, **promises of support have not always matched delivery**. South Africa's Just Energy Transition Partnership (JETP) illustrates this gap. Of the USD 14.36 billion international pledges by March 2026, only 42.6 per cent (USD 6.12 billion) had been allocated (JET PMU 2026), compared to the estimated needs of USD 85 billion over 2023–2027 (JET PMU 2023). Importantly, only 7 per cent of pledged finance was in the form of grants, underscoring the model's reliance on private capital. The existing financing landscape further constrains the transition. Bilateral public climate finance fell by 12 per cent in 2024, even as mobilised private finance rose by 33 per cent (OECD 2026). Developing countries also face mounting fiscal pressures, with government interest payments rising by 102 per cent over the past decade, compared with a 39 per cent increase in revenues (UNCTAD 2026). Financing clean energy is also structurally more expensive: the cost of capital for utility-scale solar can be two to three times higher in key emerging economies than in advanced economies or China, and is reflective of the real and perceived risks at the country, sectoral and project levels (IEA 2023).

Technology access presents a similar constraint. The Group of Twenty (G20) countries accounted for around 91 per cent of environmental technology patents granted between 2000 and 2021, with just five countries (China, Japan, the United States, the Republic of Korea, and Germany) accounting for around 85 per cent (Gupta et al. 2023). Critical minerals needed for low-carbon technologies are also highly concentrated geographically, with 15 countries[1] accounting for 55–90 per cent of global reserves and 70–95 per cent of production in 2022 (CEEW et al. 2023). In addition, the UNFCCC (2025a) synthesis of over 100 biennial transparency reports shows that technology support is focused mainly on adaptation, with limited coverage of the low-carbon technologies needed for the transition.

These operational realities (development needs, constrained finance, limited technology access, and related labour market impacts) shape what a just, orderly, and equitable transition can mean for different countries.

Key observations from the roadmap submissions

An analysis of the 21 submissions to the Presidency's TAFF roadmap, representing 115 countries[2] and accounting for over 36 per cent of cumulative greenhouse gas (GHG) emissions[3] since 1850, reveals four key observations:

- **Most submissions favour working through existing UNFCCC instruments**. Over three-quarters link their expected outcomes to these instruments, such as the outcomes of the first GST and NDCs. A few also refer to the JTWP, the Technology Mechanism, or LT-LEDS.

- **The submissions predominantly represent fossil-fuel importers**. Of the economies represented in the TAFF roadmaps, 90 per cent[4] are net importers. This results in limited representation of fossil-fuel-endowed economies and the distinct transition challenges they face. Notable exceptions, such as Norway and Russia, reflect divergent perspectives and approaches from each other to their fossil-fuel endowments.

- **More than half of global emissions are outside the Roadmap process**. Several major economies have not engaged with the Presidency's call. China alone accounts for 30 per cent of current global GHG emissions, while the United States accounts for another 12 per cent. Including India and South Africa brings their combined share to over 50 per cent.

[1] Australia, Brazil, Chile, China, DR Congo, Gabon, Indonesia, Madagascar, Mozambique, New Caledonia, Peru, Philippines, Russia, South Africa, and the United States.

[2] The 21 submissions cover 115 countries, including two negotiating groups – the least developed countries (LDCs) and the Alliance of Small Island States (AOSIS), representing 76 countries – as well as the European Union, representing its 27 member states (COP30 Presidency 2026).

[3] Excluding land use, land-use change, and forestry (LULUCF).

[4] Finding is based on only 94 economies for which the data on import/export of fossil fuels was available.

- **Non-participation does not necessarily indicate a lack of ambition among developing countries**. In 2025, clean power met all of China's growth in electricity demand (Yang et al. 2026). India achieved its 2030 non-fossil capacity target five years ahead of schedule, and its solar capacity increased 53-fold, from 2.82 GW in 2014 to 150.26 GW in 2026 (MNRE 2026). Meanwhile, Africa's solar installations are projected to grow by 45 per cent in 2026, marking a third consecutive year of growth (Jones and Nana 2026).

> Transitioning away from fossil fuels is more than a mitigation goal or question of energy substitution; it has broader implications that the UNFCCC must evolve to address.

Reconciling ambition and equity: Key considerations for the transition discourse

First, mandates to guide the transition in alignment with CBDR-RC already exist within the UNFCCC, build on them. Paragraph 28 calls on Parties to contribute to global efforts to phase down unabated coal power, triple renewable energy capacity, double the average annual rate of energy efficiency improvements, and transition away from fossil fuels, among other actions. The JTM, set to be operationalised at COP31, has the scope to cover reskilling, capacity building, and support for affected businesses, economies, and livelihoods. The Technology Implementation Programme adopted at COP30 can support technology transfer and co-development. Further, the NDCs and the Enhanced Transparency Framework provides avenues for communicating further updates on transition in a nationally determined manner. Developing new provisions around an already accepted mandate therefore risks diverting attention from strengthening existing mechanisms.

Second, the transition is not merely a matter of substituting energy systems, and the UNFCCC needs to evolve to address its wider implications. UNFCCC treats the transition largely as a mitigation-linked climate goal and it is also reflected in the Participants' represented in the submission. However, transition is closely tied to energy security, supply-chain vulnerability, economic growth, and livelihoods. These issues are closely linked to national sovereignty and are deliberated largely outside the UNFCCC, in geopolitical groupings such as the G20 and BRICS (Brazil, Russia, India, China, and South Africa). The UNFCCC's negotiation formats need to evolve to accommodate these questions, bringing in ministries of power, mines, renewable energy, trade, finance, and external affairs alongside environment ministries. A Subsidiary Body dialogue on the energy security–transition nexus, modelled on the trade dialogues agreed at COP30, could be a starting point.

Finally, economies are already transitioning; what is lacking is the means to accelerate. Concessional and grant finance fall far short of needs. The USD 100 billion goal reported to be met in 2022 (OECD 2024) is still two years late; and the USD 300 billion new collective quantified goal on climate finance (NCQG) for 2035 remains far below developing countries' estimated annual needs of USD 455–584 billion through 2030 (UNFCCC 2024a). Moreover, investment is unevenly distributed and capital is expensive. The work programme under Article 9, when rendered as an agenda, provides an avenue to enhance accountability and deliver the support obligations established under Article 9.1. Article 6 mechanisms can be explored for mobilising investment. However, South Africa's JETP experience shows that grant-based financing has one of the highest allocation rates, at 87 per cent across financing instruments[5] (JET PMU 2026). The importance of catalytic grant-based financing for the energy transition must therefore be recognised, with such financing actively earmarked under Article 9.1 and through the inclusion of finance in the upcoming operationalisation of the JTM.

In sum, voluntary efforts should remain voluntary and should not be forced into formal negotiations, thereby preserving the space for consensual and equitable action under CBDR-RC. A polycentric landscape involving multiple actors can be a force multiplier. However, acceleration cannot come at the cost of excluding economies for which the transition is not merely a matter of energy substitution. Ultimately, only an inclusive transition can be a just and equitable one.

[5] Instruments reported in the quarterly report of JET PMU (as of March 2026) include grants, highly concessional loans, concessional loans, policy loans, commercial debt, equity and guarantees; and other guarantees.

[6] The goal required the World Bank to devote 45 per cent of its annual lending resources to projects with climate co-benefits.

1. Introduction

Increasing ambition has become the dominant focus of climate action. Yet the year in which countries are being pushed hardest to raise their ambition is also the year in which efforts to finance it have weakened. The World Bank retired its 45 per cent climate co-benefits target[6] (World Bank 2026a), and many developed countries reduced their climate finance commitments. The United Kingdom (UK) almost halved its climate finance (Gabbatiss 2026), Germany announced cuts of over EUR 30 billion to its climate funding (Bloomberg 2026), and France reduced its adaptation funding by one-fifth (Desmoulières 2026). Meanwhile, the United States of America (US) withdrew from its commitments under the Paris Agreement (Haskett 2025). This retrenchment comes at a time when Europe has experienced its worst heatwave and July was reported as the warmest month globally since 1850 (WMO 2026). The window for action is also narrower than ever; UNEP (2026) confirmed that an overshoot of 1.5°C is likely within the next few years, with a best-case peak temperature rise estimated at 1.8°C. While the Paris Agreement has bent the emissions curve (UNFCCC 2025d), UNEP (2025) estimates end-of-century warming at 2.3–2.5°C, even if current nationally determined contributions (NDCs) are fully implemented.

At the most recent Conference of the Parties (COP), COP30, this push for greater ambition and urgent action featured prominently in the discourse on transitioning away from fossil fuels (TAFF), anchored in the COP28 decision. Paragraph 28(d) of the first Global Stocktake (GST 1) decision marked a significant turning point, signalling the "beginning of the end of the era of fossil fuels" (UNFCCC 2023a). It was a point of inflection that transformed a contested issue into a collective commitment. The same decision text, however, left the pathways to individual countries. It called for contributions "in a nationally determined manner", taking into account different national circumstances, pathways, and approaches (UNFCCC 2023b, 5–6).

At the same time, the landscape of climate action has changed. Three trends stand out.

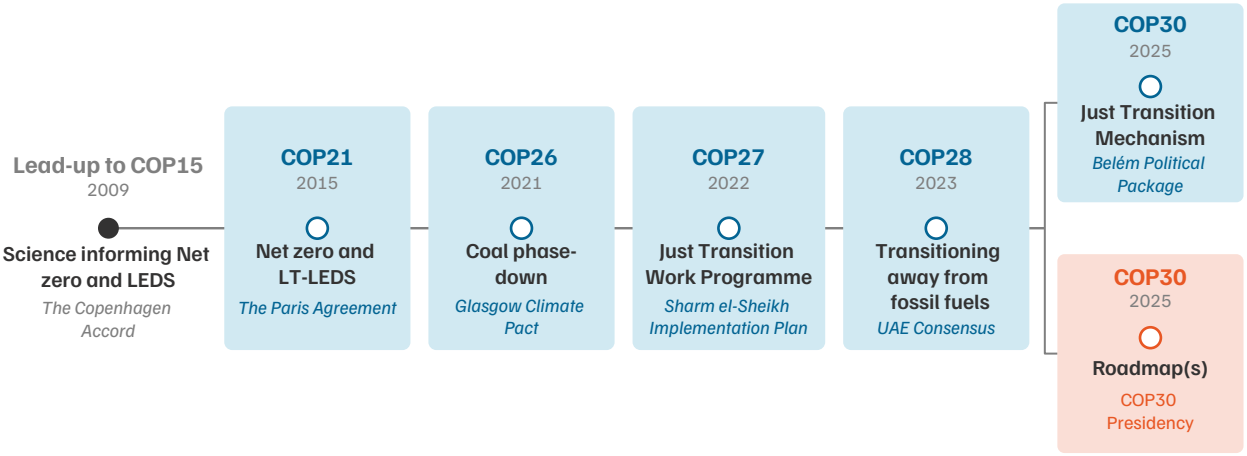
- First, **the focus of climate action has shifted towards implementation**. Climate leadership is increasingly defined not by grand declarations but by sustained credibility, action, and the ability to mobilise finance. The Climate Implementation Bridge, an action agenda item for COP31, reflects this trend, aiming to turn climate pledges into investable projects (COP31 Presidency 2026).
- Second, **new forms of international cooperation reflect the growing importance of actors and processes outside established multilateral channels and formal negotiations**. A previous Council on Energy, Environment and Water (CEEW) study highlighted the growing importance of cooperative climate initiatives in advancing climate action and India's role in fostering such cooperation (Manimaran et al. 2025).
- Third, **climate security has become central to climate discussions**, particularly following the recent energy crisis. Governments in the UK, Germany, France, Japan, and Australia have integrated climate considerations into assessments of national resilience, strategic risk, and economic security (Mosello and Zorlu 2026).

Three years after the GST decision, a Presidency-led roadmap is seeking to guide this transition outside formal negotiations. While this reflects a broader shift towards coalitions and implementation beyond formal negotiations, **the process has implications for how, and for whom, the transition is operationalised**. As it currently stands, there is consensus on the need for a transition but not on the process intended to guide it. Against this backdrop, this brief examines the evolution of the discourse within the United Nations Framework Convention on Climate Change (UNFCCC), the scope of what the transition means for the Global South, and key observations from the Parties' submissions in response to the Presidency's call for TAFF roadmaps. In doing so, it presents considerations for reconciling equity and ambition in the transition discourse.

2. The transition discourse in the UNFCCC negotiations: Paragraph 28(d) was an inflection point

In 2023, GST 1 marked a critical inflection point by producing the first COP decision calling on Parties to contribute to "transitioning away from fossil fuels in energy systems, in a just, orderly and equitable manner", recognising the need for accelerated action in this critical decade (UNFCCC 2023b, 5–6). While this language gained formal recognition at COP28, neither the efforts nor the discourse began with the GST. An examination of the evolution of this discourse reveals the **multiple dimensions of the transition process and the various UNFCCC mandates already associated with it** (see Figure 1).

Figure 1. Evolution of the transition discourse within UNFCCC negotiations



Source: Authors' visualisation

Acronyms: COP: Conference of the Parties; LEDS: low-emission development strategies; LT-LEDS: long-term low-emission development strategies

2.1 The evolution leading up to paragraph 28(d) of the GST

The Paris Agreement established two parallel channels for long-term transition ambition: net zero and long-term low-emission development strategies (LT-LEDS). Article 4.1 outlines the aim for Parties to "achieve a balance between anthropogenic emissions by sources and removals by sinks of greenhouse gases in the second half of this century", establishing the basis for net-zero commitments (UNFCCC 2015, 4). Article 4.19 invites Parties to "formulate and communicate long-term low greenhouse gas emission development strategies", providing the basis for LT-LEDS (UNFCCC 2015, 6). However, both concepts predate the Agreement. The science informing the need for net zero was already established during the Kyoto commitment period (Smith 2022). Likewise, the call for low-emission development strategies (LEDS) as an integral component of sustainable development had already emerged and first appeared in the Copenhagen Accord in 2009 (Rocha and Falduto 2019).

For most of the Paris Agreement's early years, the focus was primarily on coal. **The COP26 Glasgow Climate Pact was the first COP decision to reference phasing down unabated coal power** (UNFCCC 2021). At COP27, India proposed broadening this to a phase-down of all fossil fuels, arguing against singling out one fuel source in the fight against climate change (Sarkar 2022; The Hindu 2022). While the proposal was not incorporated into the cover decision, the same COP established the Just Transition Work Programme (JTWP). Under the Sharm el-Sheikh Implementation Plan, paragraph 51 of decision 1/CMA.4 extended the language of "just and equitable transition" to encompass energy, socio-economic, and workforce dimensions (UNFCCC 2022, 7).

At COP28, the UAE Consensus then incorporated transition language into a GST decision for the first time, calling on Parties to contribute to "transitioning away from fossil fuels in energy systems, in a just, orderly and equitable manner accelerating action in this critical decade, so as to achieve net zero by 2050 in keeping with the science" (UNFCCC 2023b). **Paragraph 28(d) of the GST thus marked a shift in emphasis from the quantity of emissions to their fuel source** (Chandrasekhar et al. 2023). At COP29 in Baku, Parties instead prioritised climate finance, particularly the new collective quantified goal (NCQG) on climate finance, while the transition discourse remained largely confined to the JTWP and dialogues on implementing GST outcomes.

2.2 How the roadmap came about, and contentions therein

In the lead-up to COP30, the call for a roadmap was first raised at the June 2025 Bonn intersessional meetings, not by Parties or the Presidency but by observer organisations (ENB 2025). At Belém, formal negotiations resulted in an agreement to develop a Just Transition Mechanism (JTM) to complement the

JTWP, with recommendations on its operationalisation to be developed at the 64th sessions of the Subsidiary Bodies (SB64) for adoption at COP31 (UNFCCC 2025c, decision 2/CMA.7, paragraph 25). However, the call for a negotiated roadmap did not secure consensus. The Presidency therefore committed, in its own capacity, to developing a roadmap outside the formal negotiated text, titled the Roadmap to Transition Away from Fossil Fuels, alongside a roadmap on halting and reversing deforestation, and to reporting outcomes at COP31. That commitment took two parallel forms.

- In April 2026, Colombia and the Netherlands, with the support of the COP30 Presidency, convened the **First Conference on Transitioning Away from Fossil Fuels in Santa Marta**. The invitation-only conference was the first structured dialogue on the transition and was attended by representatives of 57 countries, accounting for a third of global fossil-fuel consumption and a fifth of production (IISD 2026). However, prominent Global South economies, including China and India, were not invited (Dunne 2026). Participants have nonetheless continued efforts to link this parallel process to existing UNFCCC mandates, including through inputs to GST 2. A second TAFF conference is planned for Tuvalu in 2027, to be co-hosted with Ireland (IISD 2026).

- At SB64 in Bonn two months later, the Presidency held an event on the **TAFF roadmap** that referenced the Santa Marta conference. The roadmap is currently being developed with contributions from Parties and non-Party stakeholders, including Action Agenda drivers, through submissions, technical expertise, and structured dialogues. Its primary output is reported to be a strategic document consolidating these contributions to support international discussions and strengthen the implementation of climate commitments (COP30 Presidency 2026).

As a voluntary initiative, this process reflects a broader shift within the global climate system, with progress increasingly driven by coalitions of the willing (Pill et al. 2026). However, **concerns remain about the potential influence of this voluntary process on formal negotiation outcomes, particularly among developing countries that are left out of it**. At SB64, some developing country Parties stated that the initiative must remain voluntary and must not steer the Convention's existing mandates. Collectively, these developments have created a situation in the transition discourse in which **there is consensus on the need for a transition but not on the process intended to guide it**.

3. Transition discourse in the Global South: Not one transition, but several at once

For emerging markets and developing economies (EMDEs) in the Global South, the energy transition entails economy-wide transformations across labour, fiscal, industrial, market, and infrastructure systems. While this may be true for all economies, developing countries must undertake these transformations alongside persistent development gaps and dependencies. As of mid-2026, 655 million people still lack access to electricity, 85 per cent of whom are in sub-Saharan Africa (ESMAP 2026).

Fossil fuels also underpin public finances as well as power systems, making the transition a fiscal transformation rather than merely an energy transition. India's coal sector alone contributes over INR 700 billion (INR 70,000 crore) annually to central and state governments through royalties, goods and services tax, and other levies (PIB 2025). India is not unique in this regard. A 2022 International Institute for Sustainable Development (IISD) study found that fossil-fuel revenues accounted for 18 per cent of total government revenue in India and 15.7 per cent in Indonesia, compared with 8.4 per cent in Brazil, 5.5 per cent in South Africa, and 4.8 per cent in China.[7] In Russia, the share was 33.7 per cent, equivalent to 9.3 per cent of GDP. On a pathway consistent with limiting warming to 1.5°C, public fossil-fuel revenues across these six economies could be USD 278 billion lower by 2030 and USD 569 billion lower by 2050 than under a business-as-usual scenario (Laan and Maino 2022).

Moreover, **these transformations are being pursued during a period of energy crisis**. Supply-chain vulnerabilities, as demonstrated by disruptions around the Strait of Hormuz, have increasingly intertwined energy security and economic security (IEA 2026). The implications are particularly significant for developing countries, where energy access, affordability, and availability remain foundational to economic and social development. This was reinforced in paragraph 64 of the BRICS New Delhi Declaration, which highlighted "the need to enhance energy security by ensuring energy market stability and maintaining undisrupted flows of energy from diverse sources" (BRICS 2026).

[7] The study covered the BRIICS countries – Brazil, Russia, India, Indonesia, China, and South Africa – which together represented 45 per cent of the world's population.

The labour implications accompany these economic challenges. In India, the coal sector supports around 500,000 mine workers across more than 350 mines, of whom over 239,000 are employed by Coal India Limited alone (PIB 2025). Another CEEW report suggests that 4–20 million people are engaged in coal and allied sectors in India (Pal et al. 2026). In South Africa, coal mining employed 90,977 people in 2022 (Minerals Council South Africa n.d.). Workforces of this size, concentrated in specific mines and districts, cannot be redeployed through changes in the energy mix alone. A recent CEEW study estimated that a green economy could employ 48 million people by 2047 (Jain et al. 2025). Likewise, an International Labour Organization (ILO) assessment of Indonesia, the Philippines, and Viet Nam found that while Southeast Asia could lose fewer than half a million fossil-fuel jobs by 2050, it could gain up to five million, mainly in renewable energy (ILO 2022). However, as a recent NITI Aayog (2026, XVII) report notes, "energy transition creates a geographic mismatch between fossil-fuel dependent regions and renewable deployment zones": fossil-fuel-dependent states such as Jharkhand, Chhattisgarh, and Odisha face greater transition risks, while 75 per cent of installed solar and wind capacity is concentrated in Rajasthan, Gujarat, Maharashtra, Tamil Nadu, and Karnataka. **Whether these employment gains reach workers and districts experiencing losses depends on reskilling, social protection, industrial policy, and, importantly, finance**.

However, **promises of support have not always matched delivery**. South Africa's Just Energy Transition Partnership (JETP), launched in 2021 with USD 8.5 billion in pledges, illustrates this gap. In its third year of implementation, pledges had grown to USD 14.36 billion,[8] but only 42.6 per cent (USD 6.12 billion) had been allocated[9] (JET PMU 2026), against an estimated investment requirement of approximately USD 85 billion over five years between 2023–2027 (JET PMU 2023). Moreover, grants accounted for only approximately 7 per cent (USD 989 million) of pledges, highlighting the model's heavy reliance on mobilising private capital (Kruger et al. 2026). Private finance flows are also unevenly distributed. Bilateral public climate finance fell by 12 per cent in 2024, even as mobilised private finance rose by 33 per cent (OECD 2026). At the same time, EMDEs outside China account for two-thirds of the world's population but attract less than 30 per cent of total energy investment (IEA 2026). Developing countries also face mounting fiscal pressures, with government interest payments rising by 102 per cent over the past decade, compared with a 39 per cent increase in revenues (UNCTAD 2026).

> Given that roadmap is a voluntary process, non-participation does not necessarily indicate a lack of transition readiness or ambition among developing countries.

Financing clean energy is also more expensive in the economies that need it most: the cost of capital for utility-scale solar can be two to three times higher in emerging economies than in advanced economies or China (IEA 2023). Financing and capital costs account for the largest share of the levelised cost of clean electricity in developing countries, with this share generally increasing as countries become poorer and less developed (Ghosh and Harihar 2021). Against this backdrop, **existing pledges fall well short of financing needs**. The annual USD 300 billion goal under the NCQG remains far below developing countries' estimated climate finance needs of USD 455–584 billion annually through 2030, as determined by the UNFCCC Standing Committee on Finance in its second report on the determination of needs (UNFCCC 2024a). Moreover, the USD 1.3 trillion mobilisation goal and commitments to triple adaptation finance are not tied to clear finance provision obligations as elucidated under Article 9.1.

Technology access presents a similar constraint. The Group of Twenty (G20) countries accounted for around 91 per cent of patents granted under the Patent Cooperation Treaty for environmental technologies between 2000 and 2021, with just five countries (China, Japan, the United States, the Republic of Korea, and Germany) accounting for around 85 per cent (Gupta et al. 2023). A study commissioned to inform the G20 Working Group on Energy Transition found that critical minerals are geographically concentrated in terms of resources, reserves, and production. Just 15 countries[10] account for 55–90 per cent of global reserves and 70–95 per cent of production of critical minerals needed for low-carbon technologies (CEEW et al. 2023).

[8] As of 31 March 2026.

[9] 'Allocated' amounts reflect project-level commitments that have been formally validated and recorded in the JET Investments Register. 'Pledged' amounts include pipeline and policy-based instruments that have not yet translated into registered projects (as mentioned in the JET PMU report).

[10] Australia, Brazil, Chile, China, DR Congo, Gabon, Indonesia, Madagascar, Mozambique, New Caledonia, Peru, Philippines, Russia, South Africa, and the United States.

These constraints are also reflected in Parties' reports under the Convention's transparency arrangements. India, for instance, records in its first *Biennial Transparency Report* (BTR) that technology transfer through the mechanism established under Article 10 of the Paris Agreement has yet to be operationalised in the country (UNFCCC 2025b). India's experience is not isolated. The UNFCCC synthesis of more than 100 BTRs shows that 1,483 reported activities involving technology development and transfer support focused on adaptation, including water, sanitation, and agriculture (UNFCCC 2025a), with limited coverage of the low-carbon technologies needed for the transition.

These operational realities (development needs, constrained finance, limited technology access, and structural dependencies) shape what a just, orderly, and equitable transition can mean for different countries. The GST decision does not prescribe a single pathway but instead recognises nationally determined pathways that account for differences in development, economic capacity, energy security, and climate vulnerabilities.

4. Unpacking the Presidency roadmap to transition away from fossil fuels

Against this backdrop, this issue brief examines the 21 submissions made by Parties as of July 2026 to understand how, and for whom, the transition is being designed. The 21 submissions[11] cover 115 countries, including two negotiating groups, the least developed countries (LDCs) and the Alliance of Small Island States (AOSIS), which together represent 76 countries, as well as the European Union (EU), which represents its 27 member states (COP30 Presidency 2026).

4.1 A comparison of economies represented in submissions versus those outside them

The **Parties represented in the roadmap submissions include countries historically responsible**. The countries represented in the 21 submissions account for over 36 per cent of cumulative greenhouse gas (GHG) emissions[12] since 1850. While only seven G20 economies have made submissions, the represented economies still account for over a third of global GDP[13] (35 per cent), with representation from major Annex II economies such as Australia, the EU, and the UK. **Conversely, prominent developing economies absent from the Roadmap process account for a substantial share of current global emissions and the associated transition burden**. China alone accounts for 30 per cent of current global GHG emissions. Including India and South Africa brings their combined share to nearly 40 per cent of global GHG emissions in 2024.

However, non-participation does not indicate a lack of transition efforts or ambition among developing countries. For these economies, the transition remains a priority, with efforts continuing to expand rapidly. Consider the following cases:

- **China:** In 2025, clean power met all of China's growth in electricity demand, while thermal generation declined for the first time in a decade, signalling a longer-term shift (Yang et al. 2026). Consistent with this trend, China's installed solar power capacity reached 1.286 billion kilowatts at the end of July 2026, slightly exceeding its coal-fired power capacity (Xinhua 2026).

- **India:** India's transition is considerably more advanced than many observers assume. Installed solar energy capacity reached 150.26 GW in 2026, an increase of more than 53 times from 2.82 GW in 2014 (MNRE 2026). India achieved its 2030 NDC target of 50 per cent non-fossil installed electricity capacity in 2025, five years ahead of schedule (PIB 2026). By July 2026, this share had increased to 54 per cent, equivalent to 300.50 GW (PIB 2026).

- **Africa:** Africa continues to hold the highest proportion of people living in poverty and countries in debt distress (Robertson 2025). Nevertheless, solar installations across the continent are estimated to increase by 45 per cent in 2026, marking the third consecutive year of growth (Jones and Nana 2026).

Yet neither China nor India participated in the submissions process or was invited to the Santa Marta conference (Dunne 2026), reflecting the emergence of a two-tier multilateral process.

[11] Submissions can be accessed at the UNFCCC Page: https://unfccc.int/cop30/cop30-presidency-roadmaps

[12] Authors' analysis based on GHG emissions data (excluding LULUCF) from Climatewatch (2026).

[13] Authors' analysis based on GDP (current USD) from the World Bank (2026b).

Furthermore, **countries facing distinct transition burdens are underrepresented. An examination of net fossil-fuel imports**[14] **reveals that approximately 90 per cent of the economies represented in the TAFF roadmaps are net importers**. However, this does not necessarily mean that participating economies are unaffected by transition burdens. The few submissions from fossil-fuel-endowed economies reflect diverse perspectives, demonstrating that submitting inputs does not imply agreement with the process. Norway, as described in its submission as Europe's only significant oil and gas exporter, states that it is committed to remaining a stable and predictable supplier of oil and gas, produced with low emissions and in line with EU Emissions Trading System (EU ETS) requirements. Russia, on the other hand, is not in favour of a separate roadmap, arguing that decisions 1/CMA.3 and 1/CMA.5 already establish a structured approach to fossil-fuel-related issues under the Paris Agreement framework. Suriname, which remains carbon negative, states that its emerging oil and gas resources are expected to contribute to national development priorities.

Armenia also presents a distinct perspective. Citing its position as a mountainous country, it proposes ecosystem-based adaptation as a core approach that integrates mitigation, adaptation, and biodiversity objectives into the transition roadmap. Japan, while noting a phased decarbonization approach and transition technologies as indispensable, has not elaborated on its position, instead seeking clarity on how the outcomes are envisaged to be utilised.

Taken together, these positions demonstrate that **resource endowments and vulnerabilities do not lead to a uniform position but instead give rise to divergent views shaped by each economy's stage of development and exposure to transition risks**.

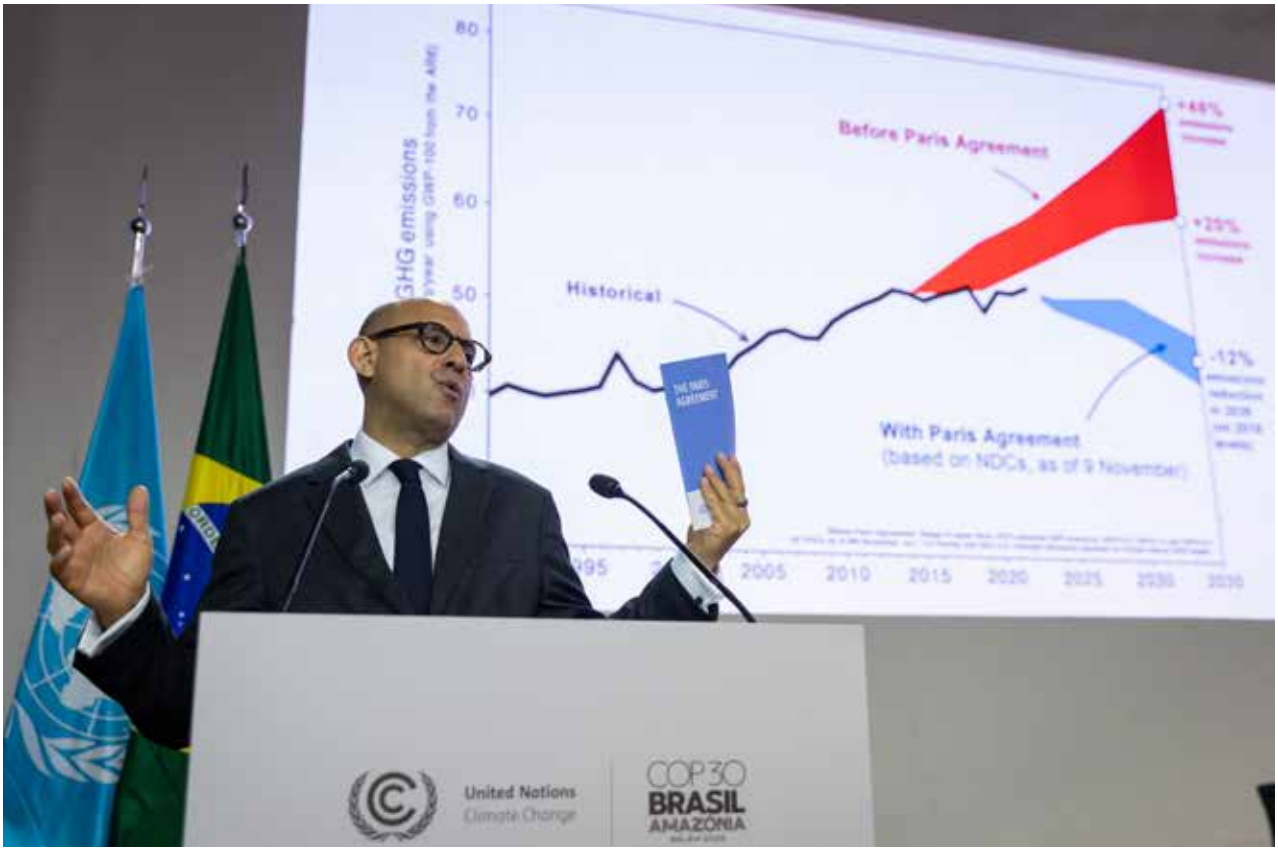


Image: UN Climate Change - Kiara Worth

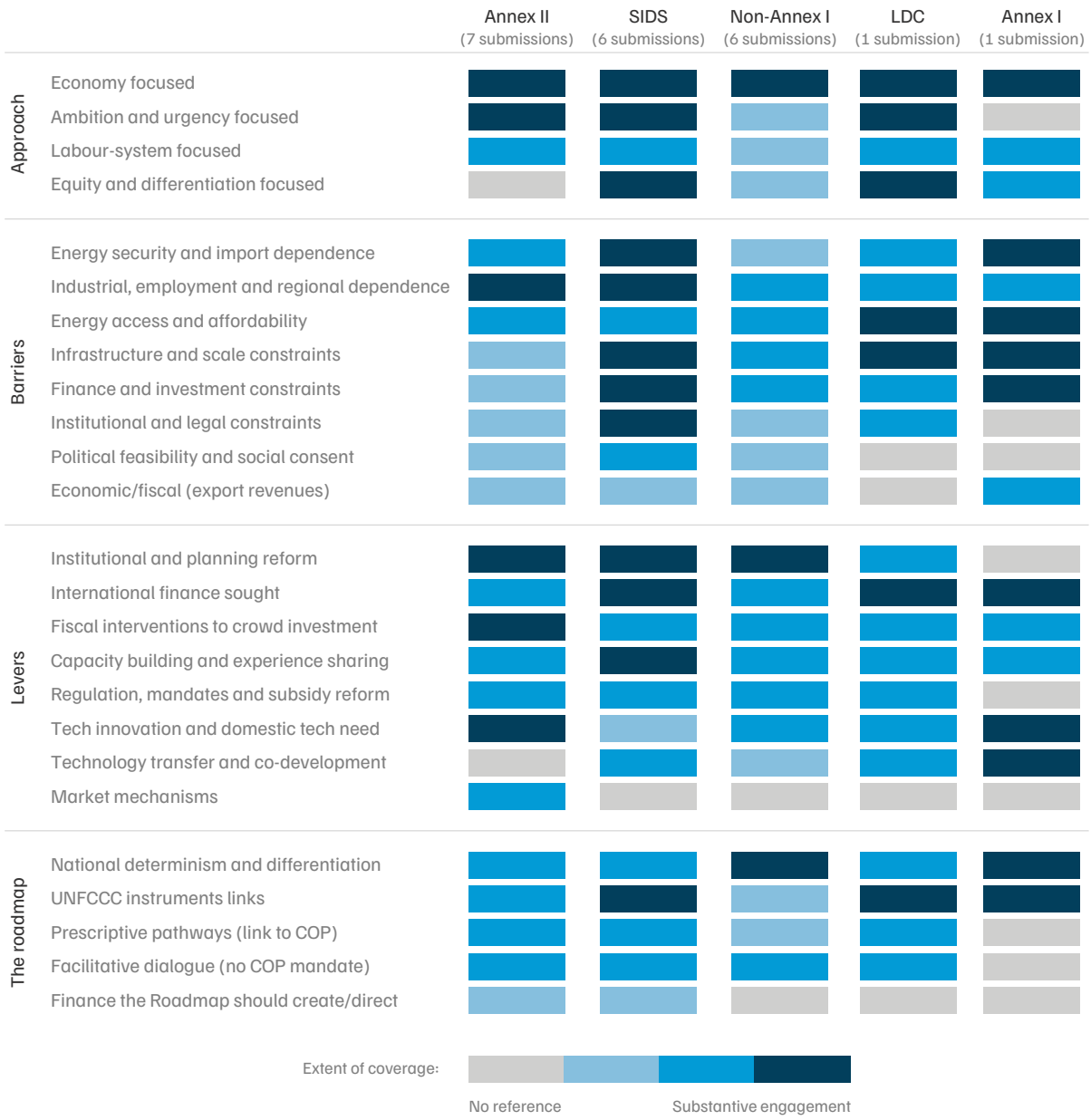
UN Climate Change Executive Secretary Simon Stiell speaks during the Opening Plenary of COP30, highlighting the emissions reductions achieved through implementation of the Paris Agreement.

[14] Authors' analysis based on data from the World Bank using a method adapted from Muttitt and Winkler (2026). For each economy, fossil-fuel imports are the share of total merchandise imports, and fossil-fuel exports the share of total merchandise exports; the difference between the two, i.e., net fossil-fuel imports, is expressed as a share of GDP for comparison across economies. The standard year is 2024. Where any input was unpublished for 2024, the latest earlier year carrying all five inputs (share of fossil fuel imports, total merchandise imports, share of fossil fuel exports, share of merchandise exports, GDP) for that economy is used. Data were available for only 94 economies.

4.2 A summary of expectations and aspirations from TAFF submissions: Who wants what?

While 21 Parties have made submissions, have been clubbed by UNFCCC groupings to identify their positions, there is considerable heterogeneity even within these groupings. Moreover, most developing countries belonging to the Group of 77 (G77) and China or the African Group have not made submissions. An overview of Party positions across different aspects of the roadmap can be seen in Figure 2.

Figure 2. Expectations and aspirations in the TAFF roadmap submissions



Source: Authors' analysis

Note: Each component is scored on a three-point scale: no mention, simple mention, and elaborated mention. The groups are ordered by their overall level of engagement across the components in each of the four categories. Each cell shows a group's combined score, shaded by quartiles.

Acronyms: COP: Conference of the Parties; LDC: least developed countries; SIDS: small island developing states; UNFCCC: United Nations Framework Convention on Climate Change

All 21 submissions frame the transition economically, but not all view it favourably. For Annex II Parties such as Australia and the UK, it is an opportunity to be seized, while for the few vulnerable non-Annex Parties that have submitted, such as the LDCs, it is an opportunity to preserve the space for continued development while transitioning. Three broad positions emerge.

- **Annex Parties:** The EU, Norway, Switzerland, the UK, Iceland, and Australia **emphasise ambition and urgency across the economy and want the roadmap to have concrete outcomes tied to UNFCCC and COP processes**. They prescribe institutional planning, fiscal interventions, and market-led options such as carbon pricing, which feature almost exclusively in these submissions. However, they give limited attention to common but differentiated responsibilities and respective capabilities (CBDR-RC) or the means of enabling differentiated responsibilities: equity considerations and technology transfer receive the least attention in these submissions. Japan, as mentioned previously, notes the importance of a phased decarbonisation approach, but has not elaborated more on its position. Russia, the only Annex I party in the grouping stands diametrically opposite, emphasising nationally determined action and referencing pre-existing UNFCCC mandates to guide the transition.

- **Small island developing state (SIDS) Parties**: AOSIS, Fiji, the Maldives, the Marshall Islands, Suriname, and Vanuatu, along with the LDCs, emphasise equitable action through CBDR-RC as the basis for urgent action, given their exposure to climate impacts despite having contributed the least to them. Energy security ties these submissions together, as does the need for concessional and grant-based finance that does not increase debt, and for early-stage technology transfer given the limitations of infrastructure and market size. **Their emphasis falls on delivery: finance and technology on concessional terms they can actually use, channelled through UNFCCC instruments**. The LDCs additionally emphasise energy access and affordability, and the economic vulnerabilities that undermine their capacities.

- **Non-Annex Parties**: Colombia, Costa Rica, Mexico, Jordan, and the Republic of Korea put forth a whole-of-economy approach. They largely look to the roadmap to share knowledge, but actions are to remain flexible and nationally determined. They reiterate the **need for transition while emphasising the space to sequence their own actions through domestic reform**. Armenia as noted previously while echoing the calls for national determinism proposed an ecosystem-based adaptation approach.

5. Reconciling ambition and equity in transitions: A few key considerations

Based on the submissions, the evolution of the discourse, and the broader plurilateral landscape for climate action, three messages are clear. First, the transition discourse reached an inflection point with the GST outcomes, but this was not the endpoint. Second, there is diversity in the scope of the transition, and no single approach can fit all. Finally, economies are already transitioning; the missing piece is not ambition but the means to accelerate action. A roadmap is unlikely to navigate this landscape and accelerate the transition on its own. In light of this, three considerations are presented for the discourse on TAFF within the UNFCCC.

First, the mandates to guide the transition already exist within the UNFCCC, and they need to be strengthened.

The submissions themselves reflect this. Over three-quarters relate their expectations of a roadmap to instruments already agreed under the UNFCCC, such as NDCs and net-zero commitments, alongside the GST outcome. Further, NDCs and the Enhanced Transparency Framework (ETF) offer avenues to communicate further updates on the transition in a nationally determined manner. Returning to negotiate new provisions under an accepted mandate would also mean losing the opportunity to strengthen and implement mandates already in place, of which there are several.

- The **GST decisions** to phase down unabated coal, triple renewable energy capacity, and double the rate of improvement in energy efficiency remain the operative collective anchors for the diversity in the transition discourse. Across the submissions, references to existing UNFCCC instruments, such as NDCs and LT-LEDS, repeatedly appear as important for establishing transition pathways. Most submissions also reference their net-zero commitments and NDC target updates as key milestones in transitioning.

- The **JTM**, set to be operationalised at COP31, presents a valuable opportunity to take forward the more operational aspects of the transition, including reskilling, capacity building, and developing social safety nets for affected businesses, economies, and livelihoods.

- While Article 10 already enshrines the principles of technology development and transfer, the new **Technology Implementation Programme**, operationalised at COP30, should identify and enable ways to transfer transition technologies as identified by countries in their needs assessments, and support co-development. The concentration of patents and resources means that transfer will not follow from deployment targets alone.

- A few submissions mention **Article 6** mechanisms for internationally transferred mitigation outcomes to further their own transition or to mobilise investment to support it.

- While not explicitly mentioned in most submissions, the **work programme on Article 9** established at COP30 on the provision of finance, when rendered as an agenda in itself, could help develop accountability and deliver much of the concessional and catalytic finance needed for the transition.

Second, these mandates still leave gaps, and closing them will require the UNFCCC to evolve to meet the challenges of implementation.

The UNFCCC continues to treat the transition largely as a climate goal, tied to a mitigation-focused transformation of energy systems. Yet, as this brief has shown, the transition is not merely a question of substituting one energy source for another or achieving net zero. It is closely linked to energy security, supply-chain vulnerability, economic growth, market maturity, and livelihood protection, all questions closely tied to national sovereignty. These questions are currently deliberated largely in forums outside the UNFCCC, such as the International Energy Agency (IEA) and International Renewable Energy Agency (IRENA), or in geopolitical groupings such as the G20 and BRICS. The analysis shows that the Parties represented in the TAFF roadmaps do not capture the diversity of transition needs and challenges across economic and energy dimensions. Despite the considerable differences already represented within the process, reinforcing transition ambition without accounting for economic security, national sovereignty, and fiscal implications, which differ significantly across economies, would undermine the potential for a just and equitable transition.

Discussions on the transition within the UNFCCC therefore can no longer remain removed from the broader factors that shape it. The UNFCCC's formats need to evolve to engage with, deliberate, and help resolve questions linking energy security and the transition. That means bringing in, alongside environment ministries, the ministries responsible for these issues: power, mines, renewable energy, trade, finance, and external affairs. The trade dialogues mandated at COP30 offer a model. They are scheduled to be held at SB64, SB66, and SB68 with the World Trade Organization (WTO), the United Nations Conference on Trade and Development (UNCTAD), and the International Trade Centre, leading to a high-level event in 2028. A similar Subsidiary Body dialogue on the energy security–transition nexus, which is non-prescriptive and respectful of nationally determined pathways, offers a way forward. It is, however, only a starting point: the UNFCCC will also need to evolve its mechanisms and instruments to meet the demands of the decade of delivery, beyond dialogues.

Finally, the missing link in accelerating transitions is not the mandate but the means to deliver on it.

Concessional and grant-based finance remain far below needs, investments are unevenly distributed, and capital costs are disproportionately higher for developing countries that need it the most. While GST 2 is set to commence this year, the UAE dialogues on implementing the outcomes of GST 1, which commenced at SB64 two years after the GST decision, continue to identify finance as an important enabler of implementation. This also applies to the actions under paragraph 28(d). Given that the USD 100 billion goal was fulfilled in 2022 (OECD 2024), two years late, the ongoing work programme on Article 9 presents an opportunity to clarify and fulfil obligations under Article 9.1 in a timely manner. In light of the scale of needs, the potential of Article 6 to mobilise investment should be explored in parallel. However, experience from South Africa's JETP shows that grant-based financing has one of the highest allocation rates, at 87 per cent across all financing instruments[15] (JET PMU 2026). Therefore, the importance of catalytic grant-based financing for the energy transition should not be understated, and such financing should be actively earmarked under Article 9.1, including through the forthcoming operationalisation of the JTM.

[15] Instruments reported in the quarterly report of JET PMU (as of March 2026) include grants, highly concessional loans, concessional loans, policy loans, commercial debt, equity and guarantees, and other guarantees.

6. Conclusion

Conferences of the Parties should continue to serve as the principal multilateral forum providing space for equitable representation and accountable action. For the transition, existing COP decisions already provide a basis for achieving outcomes similar to those Parties are pursuing through the roadmaps. Given that one size does not fit all, keeping the roadmaps voluntary would also prevent the erosion of space for consensual and equitable climate action as envisioned under CBDR-RC. The current polycentric climate landscape accommodates this diversity of actors and actions. In fact, it can be a force multiplier for accelerating the transition, but acceleration cannot come at the cost of inclusion, for only inclusive transitions can also be just and equitable.



Image: Photo by IISD/ENB

Princess Abze Djigma, Burkina Faso, celebrating the adoption of the decision on the just transition work programme at COP30 in Belém.

Acronyms

AOSIS	Alliance of Small Island States
BRICS	Brazil, Russia, India, China, and South Africa
BTR	Biennial Transparency Report
CBDR-RC	common but differentiated responsibilities and respective capabilities
CEEW	Council on Energy, Environment and Water
COP	Conference of the Parties
EMDEs	emerging markets and developing economies
ETF	Enhanced Transparency Framework
EU	European Union
EUR	Euro
G20	Group of Twenty
GDP	gross domestic product
GHG	greenhouse gas
GST	Global Stocktake
GW	gigawatt
IEA	International Energy Agency
IISD	International Institute for Sustainable Development
ILO	International Labour Organization
INR	Indian Rupee
IRENA	International Renewable Energy Agency
JETP	Just Energy Transition Partnership
JTM	Just Transition Mechanism
JTWP	Just Transition Work Programme
LDCs	least developed countries
LEDS	low-emission development strategies
LT-LEDS	long-term low-emission development strategies
LULUCF	land use, land-use change, and forestry
NCQG	new collective quantified goal on climate finance
NDCs	nationally determined contributions
NITI Aayog	National Institution for Transforming India
SB64	64th sessions of the Subsidiary Bodies
SIDS	small island developing states
TAFF	transitioning away from fossil fuels
UAE	United Arab Emirates
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
UNEP	United Nations Environment Programme
UNFCCC	United Nations Framework Convention on Climate Change
US	United States of America
USD	United States Dollar
WTO	World Trade Organisation

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The authors



Mohana Bharathi Manimaran | mohana.manimaran@ceew.in
Mohana Bharathi Manimaran

Mohana is a Programme Associate with the Climate Negotiations programme at The Council. She works at the intersection of the evolving landscape of international climate negotiations and its implications for domestic climate policy. Her research focuses on climate governance and accountability, including the Global Stocktake and transitions discourse, from a Global South lens. She holds a Master's degree in Development Studies from TISS and Sciences Po and a Bachelor's Honours from Lady Shri Ram College for Women.



Sumit Prasad | sumit.prasad@ceew.in
Sumit Prasad

Sumit leads the Climate Negotiations Programme at The Council. He has over a decade of experience in the climate negotiation's space. His expertise lies in transparency and accountability of climate action in the international climate regime. He has been appointed to the UNFCCC roster of experts by the Ministry of Environment, Forest and Climate Change, Government of India. He engages with the UN Climate Change Secretariat on matters related to capacity building for transparency and formally informs negotiations on transparency.

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Council on Energy, Environment and Water (CEEW)
ISID Campus, 4 Vasant Kunj Institutional Area
New Delhi – 110070, India
T: +91 (0) 11 4073 3300
info@ceew.in | ceew.in | @CEEWIndia | ceewindia

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